

# Online Directory & Mobile App

## Directory Administrator Instruction Manual



Guide Book Publishing

# Welcome

Congratulations on being assigned as a Directory Administrator within your congregation's Online Directory & Mobile App! You have been given administrative rights for the entire Online Directory & Mobile App. This document will give you an overview of all of the things you can do within both the Online Directory & the Mobile App.

Congregations can have multiple Directory Administrators, and have the right to assign Group Administrators to Groups within the Online Directory & Mobile App.

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# Terminology

## Directory Overview:

**Tabs:** There are four Tabs in the Online Directory & Mobile App. They are the Members Tab, Families Tab, Groups Tab, and Staff Tab.

**Family Profile Page:** This is useful for telling which Smith members belong to the same family unit. The Family Profile Pages will appear on the Family Tab of the Online Directory & Mobile App. Information on this page includes a family photo, mailing address, and home phone number.

**Member Profile Page:** The Member Profile Pages are linked within the Family Profile Page, and stand alone on the Member Tab of the Online Directory & Mobile App. Information on this page includes a member photo, mailing address, home phone number, cell phone number, and email address.

## Levels of Administration:

**Directory Administrator:** This is the top level of administration within the Online Directory & Mobile App. Your congregation may have an unlimited number of Directory Administrators.

**Group Administrator:** This is the second level of administration within the Online Directory & Mobile App. These members receive special administrative rights for specific groups on the Groups Tab.

**Group Member:** This is a member whose Member Profile Page has been connected to the specific Group.

**Directory Member:** This is a member that has a Member Profile Page, but is not connected to the specific Group as a Group Member.

**User vs Admin Login:** Information that members view as “touch address to locate on map”, “touch to email” or “touch phone number to call” are fields that Directory Administrators can edit. These fields will become interactive when you log in with your Directory Member username and password.

**Levels of Access:** Determined by the Directory Administrator

**Open Mode:** Users may make changes to their own Member Profile Page and Family Profile Page.

**Admin Mode:** Only Directory Administrators may make changes to any Member Profile Page and Family Profile Page. Members may not update their own information.

**Private Directory:** This sets up each member with their own Username and Password to gain access to the Online Directory & Mobile App. This allows Directory Administrators to add access to and remove access from individual members.

**Limited Directory:** This sets up the entire church on one Privacy Key to gain access to the Online Directory & Mobile App. This means that you cannot restrict access from an individual member without changing the Privacy Key for the entire church. Members may not make changes to Profile Pages without a unique Username and Password when using the Limited Directory.

### **Group Messaging Features:**

**Message Group:** This optional button, when clicked on, allows the person to send an email to every connected Member Profile Page (that contains an email address) for that Group. All members will have the option to opt out of receiving emails through their Member Profile Page.

**Mobile Notification:** This optional button, when clicked on, allows the person to send a Mobile Notification to every connected Member Profile Page's mobile device for that Group. All members will have the option to opt out of receiving notifications through the log-in screen.

## Contact Us

If you have a question that your Directory Administrator cannot answer, feel free to contact GBP by email at [amandavogt@guidebookpublishing.com](mailto:amandavogt@guidebookpublishing.com) or call us toll free at 800-597-3037 and ask for Amanda Vogt. We are available to help you Monday-Friday 9:00-5:00 CST.

# Selecting Default Settings

GBP provided your congregation with a Google Set-Up Questionnaire link ([https://docs.google.com/forms/d/e/1FAIpQLSeSmtej6126\\_9rBEk1oeKaMmJvbbEK3rz97Kg\\_MyjbYaeagHQ/viewform?usp=sf\\_link](https://docs.google.com/forms/d/e/1FAIpQLSeSmtej6126_9rBEk1oeKaMmJvbbEK3rz97Kg_MyjbYaeagHQ/viewform?usp=sf_link)) when you completed your Addendum to the printed Guide Book & Directory Publishing Agreement for the Online Directory & Mobile App. The Default Settings in your Online Directory & Mobile App reflect the answers to that questionnaire.

This information can be adjusted by visiting the Admin Tab or by contacting GBP.

# Advertising

Advertising space is available within your Online Directory & Mobile App. GBP sells Banner Ads and Sponsor Ads to cover the cost of your free-to-use Online Directory & Mobile App. If a member of your congregation or a local business owner is interested in advertising, have them contact GBP at 800-597-3037, and give them the four digit number for your publication so we can direct them to the right person.

Advertisers in the Online Directory & Mobile App do NOT have access to view your Online Directory & Mobile App unless they are a member of your congregation (through their Member Profile). We do not give advertisers access in order to protect your members from the possibility of spam emails.

There are four Banner Ads available, one for each tab. These spaces are sold on a first-come basis each year. In renewal years, the spaces are offered first to those currently advertising in those Banner Ad spaces. Banner Ads are visible on computers, but not on all mobile devices due to space constraints.

Sponsor Ads are unlimited in number. The Sponsor Ads appear as Member Profile Pages. These profiles will always appear at the top of the Members Tab. Please do not try to edit these profiles. These businesses have paid to put those images and information within their Member Profile Page. The Sponsor Ad Member Profile Pages will also appear as the first Family Profile, and the first Group on the Groups tab.

As this is an interactive Online Directory & Mobile App, advertisers may change throughout the year if a business requests GBP change their image or if new businesses wish to advertise. If an advertiser or potential advertiser contacts you about advertising part way through the year, please direct them to contact GBP.

# Steps to Launch

## **Renewal Week for printed Guide Book & Directory:**

- Form a Team for your Online Directory & Mobile App (Optional)
- Schedule a Team Meeting for Week 3 (Optional)

## **Week 1:**

- Publish the Development Article in your Bulletin and/or Newsletter (Page 41)
- Complete your [Google Set-Up Questionnaire](#)

## **Week 2:**

- Learn about Groups within the Online Directory (Page 41)

## **Week 3:**

- Publish the Groups List Article in your Bulletin and or Newsletter (Page 41)

## **Week 4:**

- Schedule your second Team Meeting for Week 5 or 6
- Gather information for creating Groups

## **Week 5:**

- Learn about photos within the Online Directory (Page 42)

## **Week 6:**

- Get access to the Online Directory
- Start creating Groups in the Online Directory (Page 34)
- Promote your Photo Day (optional)

## **Week 7: Copy In for Printed Book**

- Decide who will be collecting a list of members that do not want to be listed in the Online Directory & Mobile App
- Hold your Photo Day after services (optional)

### **Week 8: Proof Out for Printed Book**

- Continue creating Groups in the Online Directory
- Return the Member Instructional Email Text (page 42)

### **Week 9 & 10: Proof Back for Printed Book**

- Publish the Privacy Reminder and Photo Submission Article in your Bulletin and/or Newsletter (page 41)
- Continue collecting list of members to make Not Visible (page 13)

### **Week 11:**

- All member data is uploaded to the Online Directory
- Add Member Profiles to Groups, Upload Photos, etc.

### **Weeks 12-14:**

- Continue finalizing items in the Online Directory

### **Book at Press:**

- Call with GBP to finalize all last details about launch

### **Books in Mail:**

- GBP will launch your Online Directory & Mobile App

# Quick Links

## Online Directory Access:

You will receive an email with your access information for the Online Directory & Mobile App around week five or six of the launch process.

If you need a Username and/or Password set up for additional Directory Administrators, or Group Administrators at this point in the process, let GBP know that by email with the person's name and their email address.

The website URL will be listed within the Guide Section of your printed Guide Book & Directory starting the launch year. We also strongly recommend that you place a link to the sign in page on your own congregation's website before launch.

## Download the Mobile App:

The Mobile App is available for Apple, Android, Windows devices, along with the Kindle Fire tablets. To download the Mobile App, search for "Guide Book Publishing" by Liebermann Technologies in your app store.

Once downloaded an Allow Notifications option will appear. Select ALLOW if you wish to use the Mobile Notifications feature within the Online Directory & Mobile App. You will then be asked for a Mobile Privacy Code. This is the first part of your Online Directory URL.

Example URL: <https://firstumc.gbpd.co>

Mobile Privacy Code: firstumc

## Online Directory Tutorial Videos:

Member Tutorial Videos: [www.guidebookpublishing.com/membertutorial.html](http://www.guidebookpublishing.com/membertutorial.html)

Member Introduction Video    Updating Your Profile

Group Messaging

Group Administrator Videos: [www.guidebookpublishing.com/groupadminvideo.html](http://www.guidebookpublishing.com/groupadminvideo.html)

Group Administrator Tutorial

Directory Administrator Videos: [www.guidebookpublishing.com/con/adminvideo.html](http://www.guidebookpublishing.com/con/adminvideo.html)

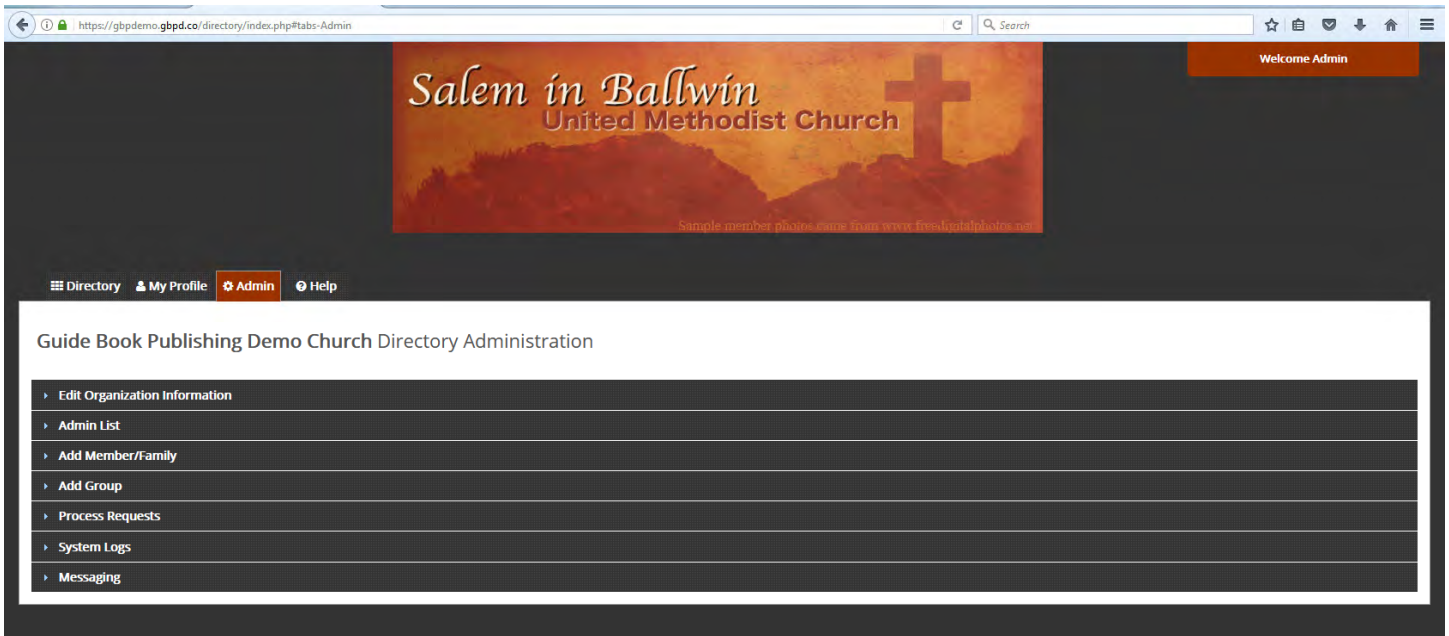
(Your username and password are available in the printed Guide Book & Directory Handbook)

Administrator Introduction Video    User vs Admin Login

Admin Steps to Launch Tutorial    Group Messaging for Admin



# Tutorials: General Information



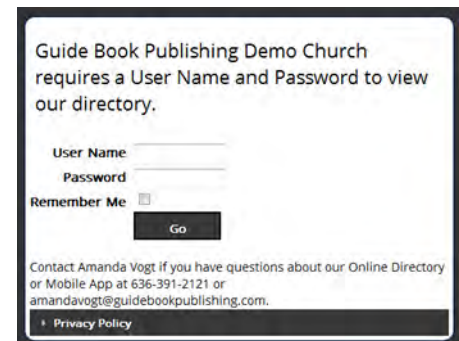
## Topics

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# Computers: Log In Information

1. Log in with the username and password that were provided to you
2. Click *Remember Me* if you want your username and password saved for you on this computer
3. Click *Go*

Note: Forgot your username and password? Directory Administrators and GBP can reset your information for you.

A screenshot of a web login page for 'Guide Book Publishing Demo Church'. The page has a white background with a dark border. At the top, it says 'Guide Book Publishing Demo Church requires a User Name and Password to view our directory.' Below this are two input fields: 'User Name' and 'Password'. There is a 'Remember Me' checkbox and a 'Go' button. At the bottom, there is contact information for Amanda Vogt and a 'Privacy Policy' link.

# Mobile Devices: Log In Information

1. Log in with your username and password that were provided to you
2. If you do not want to receive Mobile Notifications on this device, check the box for Mobile Notifications
3. Click *Remember Me* if you want your username and password saved for you on this device
4. Click *Go*

A screenshot of a mobile login page. The title is 'Log in using your user name and password'. It has input fields for 'User Name' and 'Password'. Below these are two checkboxes: 'Remember Me' and 'I do not wish to receive notifications from Grace Church on this device.' A red arrow points to the 'Remember Me' checkbox. There is a 'Go' button and a 'Privacy Policy' link at the bottom.

# Troubleshooting Texting

Cell phone doesn't show the option to text on mobile devices:

When using the Mobile App, users are given the option to call or text cell phone numbers. This feature works when numbers are listed in the Cell Phone field which is located in the Member Profile Page.

# Photo Specifications

You may upload high quality images, up to 9MB in file size. The program will allow you to crop the images to fit into the Online Directory & Mobile App.

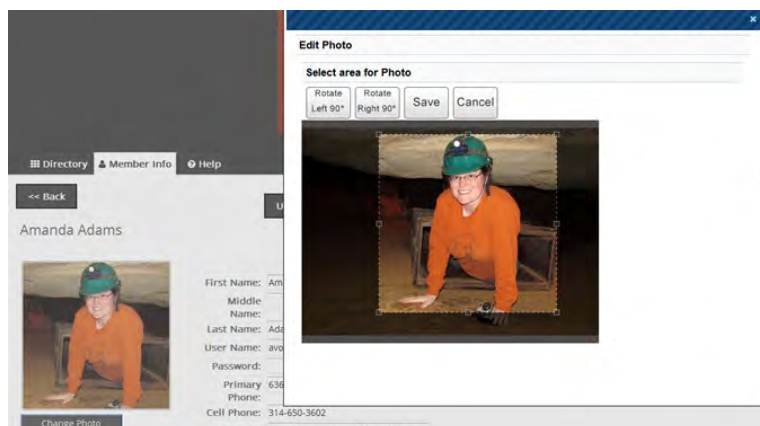
Family & Group Profile Images: 350 x 263px

Member Profile Images: 350 x 350px

# Online Directory: Upload/Change Photo

1. Open your Member, Family, or Group Profile Page
2. Select *Change Photo* below the photo
3. You have three options:

- *Edit Photo* allows you to crop and rotate your existing photo. To crop position your cursor on the photo, then click and drag the cropping tool. When complete, click Update.
- *Upload New Photo* allows you to upload a new photo. Follow the prompts to choose, crop, and save a photo.
- *Remove Photo* will delete your photo and replace it with the default "No Photo" image.



# Mobile App: Upload/Change Photo

1. Open your Member, Family, or Group Profile Page
2. Select *Change Photo* below the photo
3. *Upload New Photo* allows you to upload a new photo from either your camera or photo gallery. Drag your finger to position the cropping tool, click *Update*.

# Search Feature

In the Search field, type all or part of the name of the individual, family, or group you are seeking.

The Search field operates within the Tab selected. For example, if you search Jane:

- Members Tab: All members named Jane will appear (ie. Jane Doe, Jane Smith)
- Families Tab: All families with Jane listed in the Family Name will appear (ie. DOE, John & Jane)
- Staff Tab: All staff members named Jane will appear
- Groups Tab: You can search by Group Name (ie. Trustees)

Mobile App Note: Use the *Navigate To* menu to select which Tab to view.

## Additional Information/Custom Fields

Additional fields can be added to Member Profiles and Family Profiles. Each profile can accommodate up to ten custom listings.

1. From within the Profile Page, scroll down and locate Additional Information: *Add New Information*
2. In the Label box, type the category of information you are adding (ie. Hobbies)
3. In the Detail box, type the specific information (ie. Knitting)
4. In the Order box, type the order you want the additional information to appear
5. Click *Update* to save changes between adding each listing

Note: To delete additional information listings, select the Remove box below the custom field you wish to delete, and click *Update*.

## Removing Profiles Overview

For information on Adding Profile Pages: New Family and Family Members (pages 19-20); New Member to Existing Family (page 32); Group Profile Page (page 21); Staff Profile Page (page 29).

There are two options for member's information to not appear in the Online Directory & Mobile App: make them not visible; or delete them entirely.

**Not Visible:** The user can still log in and use the system, but no one except Directory Administrators can see their information.

**Deleted:** The user can no longer access the system, and no one can see their information because it doesn't exist.

Do NOT delete any advertiser profiles. Those businesses purchased advertising within your Online Directory & Mobile App so that GBP can provide this service to your congregation at no cost.

# Delete Profile

**Family Profile:** Clicking the *Delete* button on this Family Profile will only delete the Family Profile page, not the Member Profile Pages attached to it.

**Member Profile:** Clicking the *Delete* button on this profile will remove any listing of this Member Profile Page throughout the system. The Family Profile Page will remain. To completely remove someone from the system you must remove all Member Profiles for the family and the Family Profile.

**To remove a Member Profile from either a Family Profile or Group Profile:** Check the Remove box at the bottom of the Member Profile listing, and click *Update*. The Member Profile will be removed from the Family or Group, but will remain listed within the Member Tab and any other Family or Group to which they belong.

**To Remove a Staff Member:** Select the Staff Tab, check the Remove box at the bottom of the Member listing, and click *Update*. You will need to go to the Family and Member Tab to remove the Member Profile Page altogether if needed.

# Profile Visibility

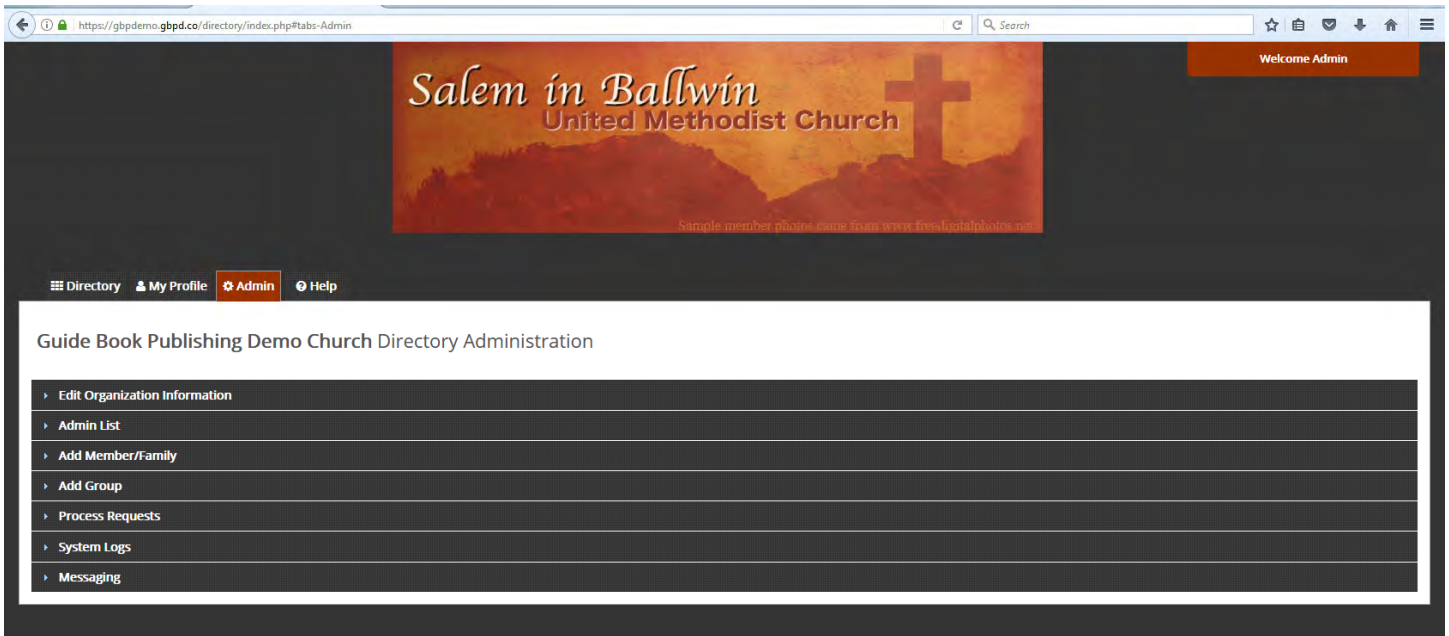
On both the Members Tab and the Families Tab, Directory Administrators can remove visibility. However, they must be done separately, so be sure to do both places.

To make a Member Profile or Family Profile not visible, go to that profile page and check the button *Not Visible*, then click *Update*. A filter should appear over their profile photo saying Not Visible.

To reverse this, click the *Visible* option, then click *Update*. The filter will disappear on their photo.

The screenshot shows a web interface for managing family profiles. At the top, there are navigation tabs: Directory, Family (selected), My Profile, Admin, and Help. Below the tabs is a 'Back' button. The main heading is 'Family Name: ADAMS Bob & Dee, Amanda, Christina'. To the left is a family photo. To the right is a form with fields for Family Name, Address, City, State, Zip, and Phone. Below these fields is a 'Visible' toggle with two options: 'Visible' and 'Not Visible'. A red arrow points to the 'Not Visible' option, which is currently selected. Below the form is an 'Additional Information' section with a link to 'Add New Information'. At the bottom of the form are 'Update', 'Cancel', and 'Delete' buttons. Below the form is a section for 'Family Members' with buttons for 'Add Member to Family' and 'Email Family'. At the bottom are three small profile photos of family members.

# Tutorials: Admin Tab



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# Edit Organization Information

Guide Book Publishing Demo Church Directory Administration

**Edit Organization Information**

**Organization Information**

Customer ID: 0

Organization Name: Guide Book Publishing Demo Church

Short Name: gbpdemo

Phone Number:

Organization URL: http://saalemballwinumc.org/

Address: 14825 Manchester Road

City: Ballwin

State: Missouri

Zip: 63011

**Export User Information**

**Organization Configuration**

**Login Box**

**Contact Info:** Contact Amanda Vogt if you have questions about our Online Directory or Mobile App at 636-391-2121 or amandavogt@guidebookpublishing.com.

**Default Page View**

**Start on this tab:** Family

**View Options:** Photo, Name, Phone #, and Address

**Directory Colors**

**Directory Color:** #333333 This is the main color around the top and sides of your directory.

**Highlight Color:** #993300 This is the color selected items will become.

**Tab Color:** light grey This is the color behind the photos in the directory view.

**Font Color:** Black This is the color of the font under each photo.

If no photo is available, use the following photo

Default Tab One Photo:

Edit Photo

## Box 1: Organization Information

The only item you should use in this box is the Export User Information button. This button will give you an Excel file with each Member Profile page as its own row. There will be a slight delay after hitting the button before the file will appear for downloading.

## Box 2: Login Box

The text in this box is what will appear on the Login Screen of your Online Directory & Mobile App. If you change the text, be sure to scroll down and select the *Update* button to save your changes.

Guide Book Publishing Demo Church requires a User Name and Password to view our directory.

User Name

Password

Remember Me ☐

Go

Contact Amanda Vogt if you have questions about our Online Directory or Mobile App at 636-391-2121 or amandavogt@guidebookpublishing.com.

[Privacy Policy](#)



Guide Book Publishing Demo Church Directory Administration

**Edit Organization Information**

Organization Information      Organization Configuration

Customer ID: 0  
 Organization Name: Guide Book Publishing Demo Church  
 Short Name: gbpdemo  
 Phone Number:  
 Organization URL: http://saalemballwinumc.org/  
 Address: 14825 Manchester Road  
 Address2:  
 City: Ballwin  
 State: Missouri  
 Zip: 63011  
 Export User Information

**Login Box**

Contact Info: Contact Amanda Vogt if you have questions about our Online Directory or Mobile App at 636-391-2121 or amandavogt@guidebookpublishing.com.

**Default Page View**

Start on this tab: Family  
 View Options: Photo, Name, Phone #, and Address

**Directory Colors**

Directory Color: #333333 This is the main color around the top and sides of your directory.  
 Highlight Color: #993300 This is the color selected items will become.  
 Tab Color: light grey This is the color behind the photos in the directory view.  
 Font Color: Black This is the color of the font under each photo.

If no photo is available, use the following photo

Default Tab One Photo: Edit Photo

## Box 3: Default Page View

This box shows which Tab the Directory will default open to, and what information to show below the profile photos on that tab. Click *Update* if you make any changes.

## Box 4: Directory Colors

Directory colors may be adjusted by entering generic colors (black, blue, etc.), or by entering specific hexadecimal colors. Click *Update* if you make any changes.

To see a complete listing of colors and hexadecimal numbers, go to:

[http://www.w3schools.com/html/html\\_colornames.asp](http://www.w3schools.com/html/html_colornames.asp)

## Box 5: Placeholder Photos

There are three placeholder images that may be changed as necessary: Tab one (Member Profile Photo); Tab Two (Family Profile Photo); Tab Three (Group Profile Photo). Click *Edit Photo* to make changes to the specific photo.



# Admin List

Your Online Directory & Mobile App can have multiple Directory Administrators. We recommend that Directory Administrators log in with a separate Directory Admin Profile when editing the directory, and use their Directory Member Profile when using the Online Directory & Mobile App so they have access to all the interactive directory features.

Salem in Ballwin  
United Methodist Church

Directory My Profile Admin Help

Guide Book Publishing Demo Church Directory Administration

Edit Organization Information

Admin List

+ Add Admin

Name	Email	Change Notice	Remove as Admin
AdminJohn	john@me.com	<input type="checkbox"/>	<input type="checkbox"/>
Admin		<input type="checkbox"/>	<input type="checkbox"/>
Amanda Vogt	amandavogt@guidebookpublishing.com	<input type="checkbox"/>	<input type="checkbox"/>

Update

+ Add Member/Family

+ Add Group

+ Process Requests

+ System Logs

+ Messaging

## Box 1: Existing Administrators

This shows a list of current Directory Administrators and what email address is listed on their Member Profile Page for their Directory Admin Account.

## Box 2: Settings

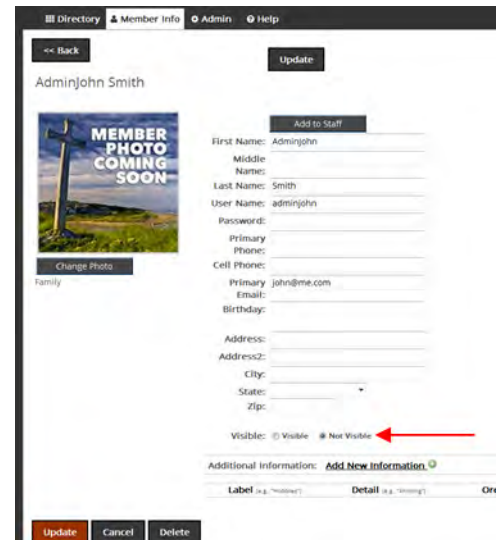
If you wish to receive an email anytime someone makes a change within the Online Directory & Mobile App, check the Change Notice box, and click *Update*. This will send an email to the email address listed on that line.

To remove Directory Administrator rights, check the Remove as Admin box, and click *Update*. You will then need to remove their Directory Admin Member Profile Page through the Members Tab.

## Box 3: Add Admin

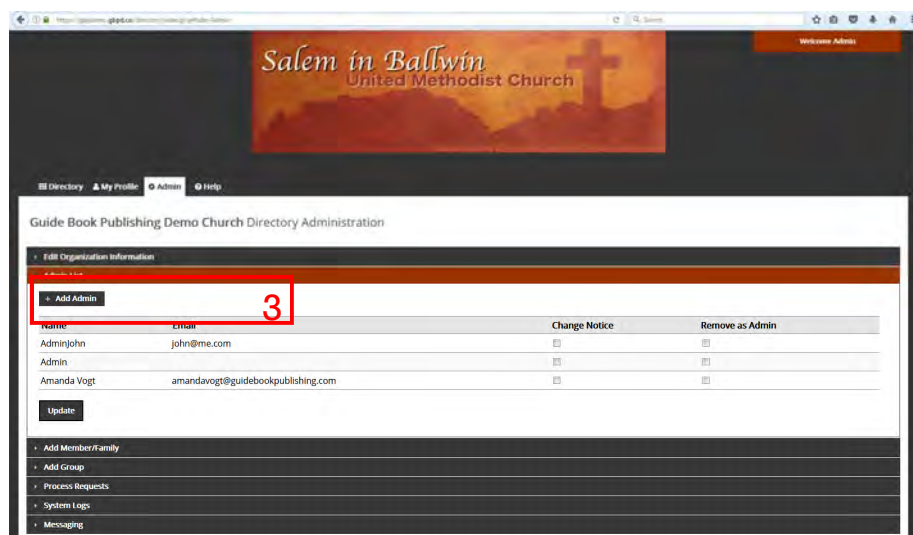
To Add a Directory Administrator, you will first create a Directory Admin Account:

1. Go to the Directory Administrators Family Profile Page on the Families Tab
2. Click *Add Member to Family, Create New Member*
3. Fill in the Information Fields: (ie. Administrator John Smith)
  - First Name: AdminJohn
  - Last Name: *leave blank*
  - Username: adminjohn
  - Password: *your choice*
  - Add Email Address
4. Click *Save*
5. Near the bottom of the profile, select *Not Visible*
6. Click *Update*



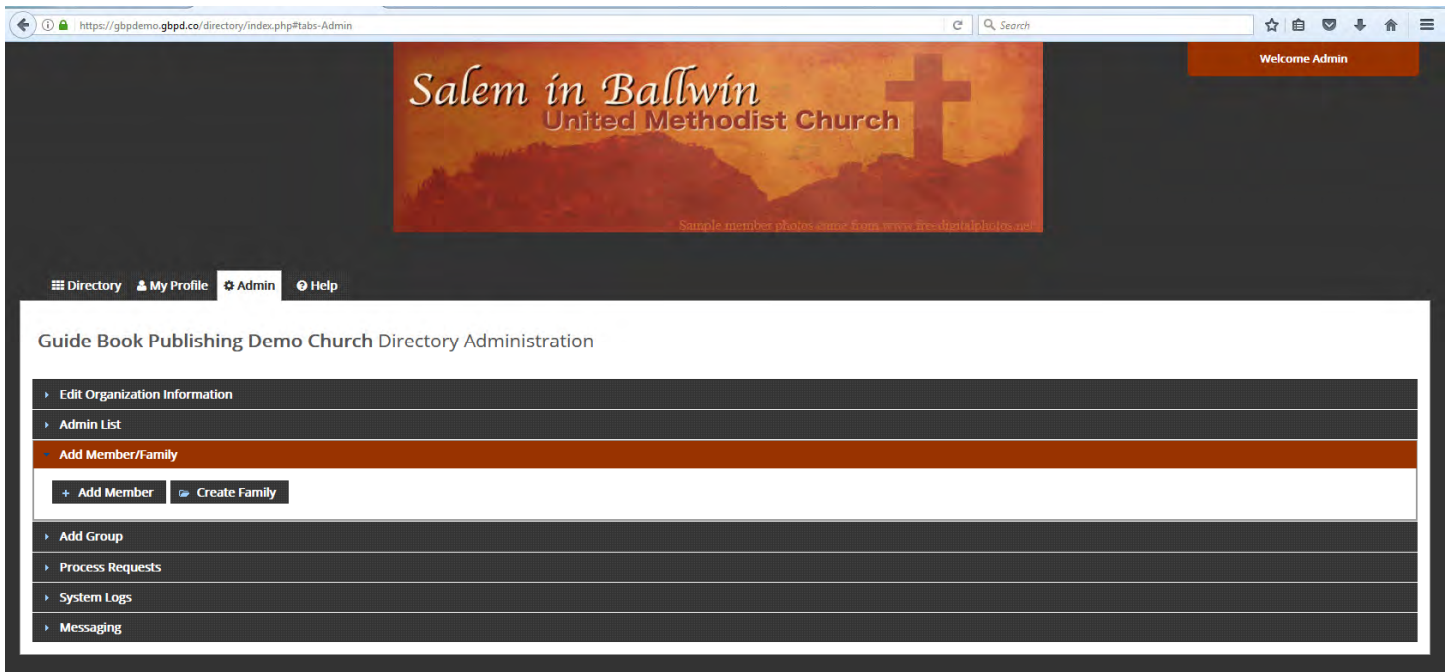
To give the new profile Administrator privileges:

1. Click the *Add Admin* button highlighted in box 3
2. In the Search Field, type their name (ie. Admin John)
3. Select the correct Member Profile from the drop down
4. Click *Save*



# Add Member/Family

Directory Administrators are the only people who are authorized to add members to the Online Directory & Mobile App. As new members join your congregation, you will use this feature to Add Members to existing families, or Create Families.



## Add Member through Admin tab

Use this button when you already have created a Family Profile Page and you need to add a new member to that family.

1. Click *Add Member*
2. Type in the same Family Name as the existing Family Profile (including capitalization and commas)
3. Fill in the fields with known information
4. Click *Save*

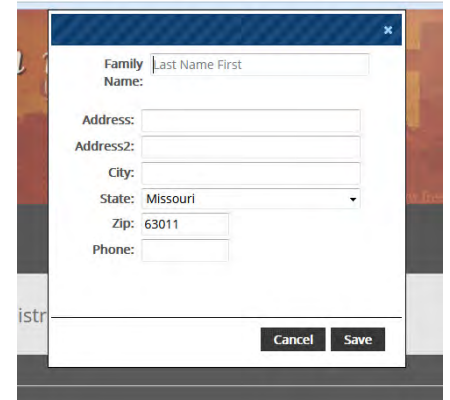
Note: This can also be done via the existing Family Profile Page by selecting the *Add Member to Family* button (see page 32).

A screenshot of a web form titled 'Add to Family'. The form has a blue header bar with a close button (X). It contains several input fields for member information: 'Add to Family:', 'First Name:', 'Middle Name:', 'Last Name:', 'User Name:', 'Password:', 'Primary Phone:', 'Cell Phone:', 'Primary Email:', 'Birthday:', 'Address:', 'Address2:', 'City:', 'State:', and 'Zip:'. At the bottom right of the form are two buttons: 'Cancel' and 'Save'.

# Add Family

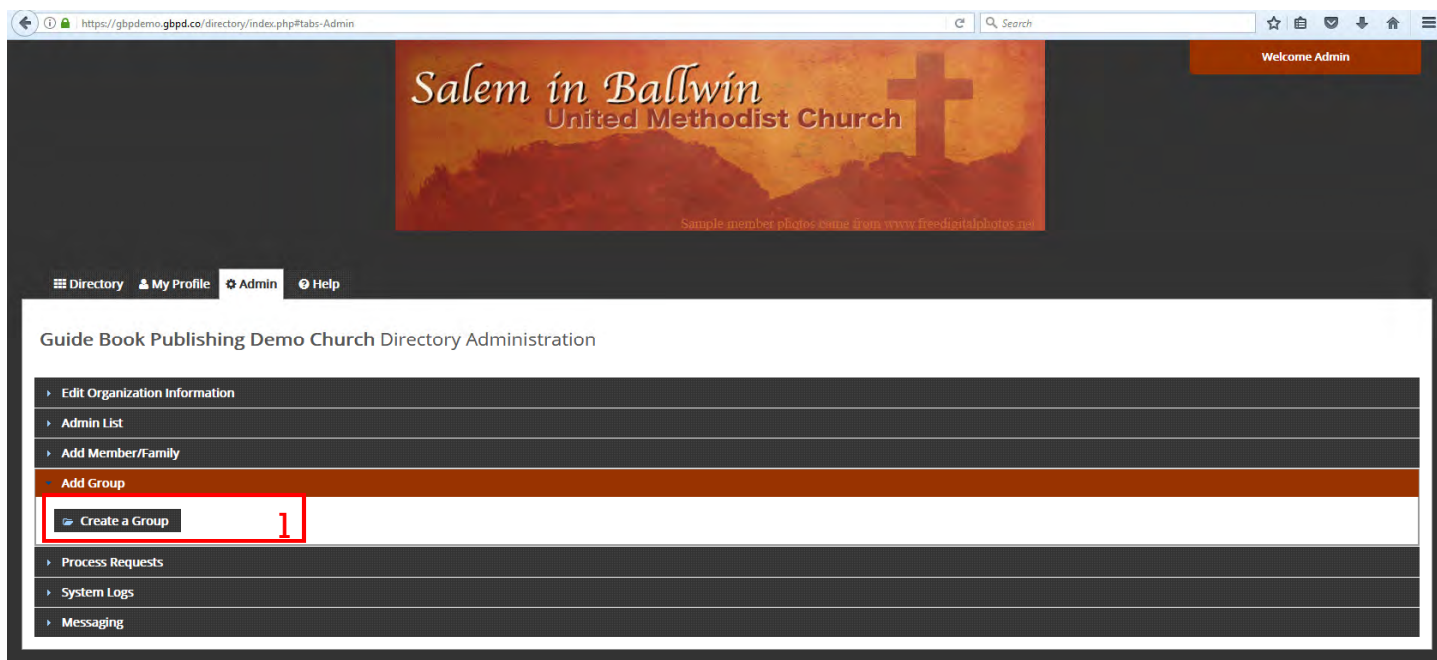
Use this button when you need to create a brand new Family Profile Page.

1. Click *Add Family*
2. Type in the Family Name as LAST NAME, Head, Spouse, Kids
3. Fill in the fields with known information for the family
4. Click *Save*
5. Use the *Add Member to Family* button on the Family Profile Page to create Member Profile Pages for each family member (see page 32)

A screenshot of a web form titled 'Add Family'. The form has a blue header bar with a close button (X). Below the header, there are several input fields: 'Family Name:' with a placeholder 'Last Name First', 'Address:', 'Address2:', 'City:', 'State:' with a dropdown menu showing 'Missouri', 'Zip:' with '63011', and 'Phone:'. At the bottom right of the form are two buttons: 'Cancel' and 'Save'.

Note: Members can be listed in more than one family, such as a child with separate family profiles for each parent. To add an existing member to a Family Profile, go to the Family Profile, click *Add Member to Family*, and type the member name in the Member Search Field. A list of potential matches will appear. Select the desired member and click *Save*.

# Add Group



## Create Group

To create a new Group Profile Page for the Groups Tab, follow these steps:

1. Click *Create a Group*
2. Enter a Group Name and Description
3. Click *Save*
4. Upload a Group Profile Photo
5. Add Member Profile Pages to the Group through the *Add Member to Group* button
6. Type the Member's Name into the Search Box, and click *Save*, repeat as necessary
  - If the member is going to be the Group Administrator, for Member Type choose Group Admin

Note: See page 34 for more details on Groups.

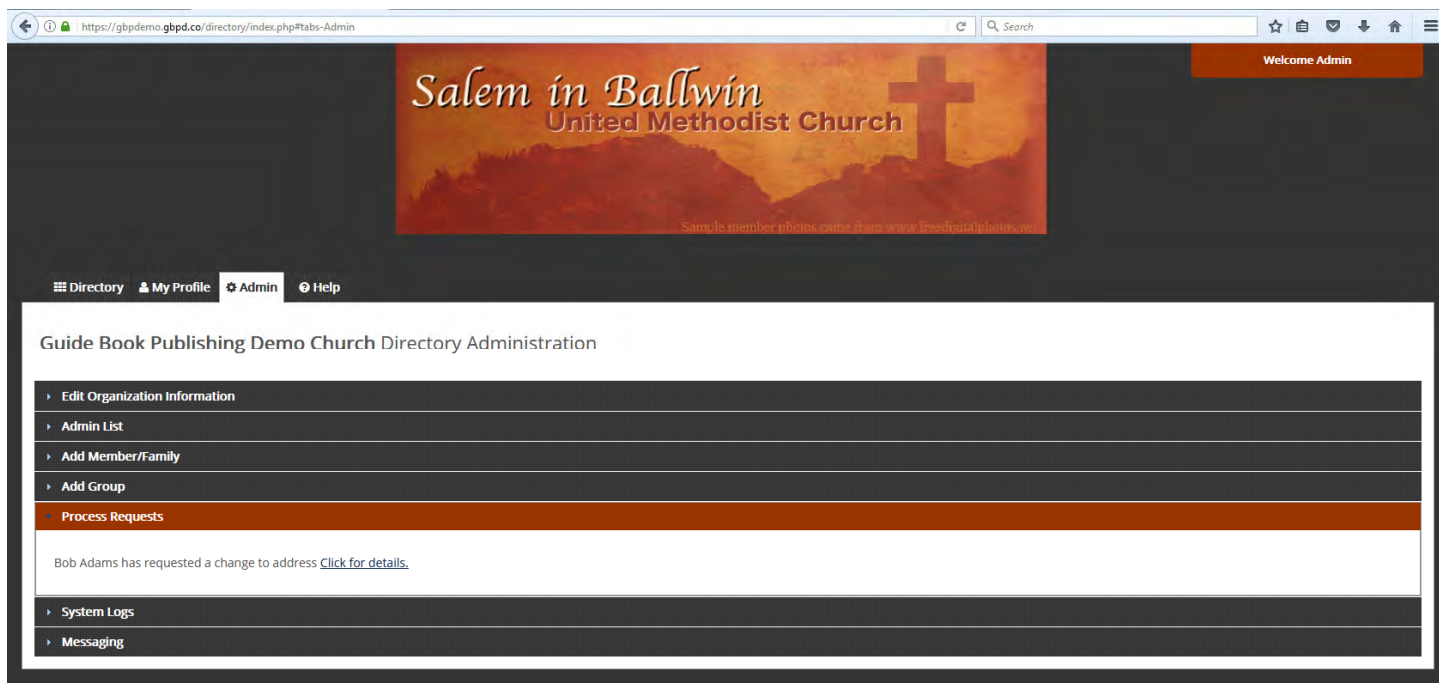
The screenshot shows the 'Create Group' form. The 'Group Name' and 'Group Description' fields are highlighted with a red box and the number 2. The form includes 'Cancel' and 'Save' buttons at the bottom.

The screenshot shows the 'Create new Member' form. The 'Group Member Type' dropdown is set to 'Group Member'. The 'Member Search' field is highlighted with a red box and the number 6.

The screenshot shows the 'Altar Guild' group profile page. The 'Change Photo' button is highlighted with a red box and the number 4. The 'Group Members' section is highlighted with a red box and the number 5, showing the 'Add Member to Group' button.

# Process Requests

This feature is only used if you have requested that changes must be verified by a Directory Administrator before they go live to the general membership. For most churches, we do not use this feature as it can be very time consuming to verify every change versus watching your emails and adjusting the occasional item when needed.



The screenshot shows the 'Process Requests' section of the church directory administration interface. The page title is 'Salem in Ballwin United Methodist Church'. The navigation menu includes 'Directory', 'My Profile', 'Admin', and 'Help'. The 'Admin' section is expanded, showing options like 'Edit Organization Information', 'Admin List', 'Add Member/Family', 'Add Group', 'Process Requests', 'System Logs', and 'Messaging'. The 'Process Requests' option is highlighted, and a message below it states: 'Bob Adams has requested a change to address. [Click for details.](#)'

## Process Requests - View Details

If you are using this setting, click *View Details* next to each line item as they appear. Then select either *Approve* or *Deny*.



The screenshot shows the 'View Details' modal for a request to change an address. The modal title is 'Bob Adams would like to change the address of 'ADAMS Bob & Dee, Amanda, Christina''. The table below shows the details of the request:

Field Name	Old value	New Value
Address1	16014 Forest Valley Dr.	16041 Forest Valley Dr.

At the bottom of the modal, there are three buttons: 'Cancel', 'Deny', and 'Approve'.



# System Logs

The screenshot shows the 'Salem in Ballwin United Methodist Church' directory administration interface. The 'System Logs' section is highlighted with a red box. Inside this box, there is a date range filter (labeled 1) with 'Start:' and 'End:' fields. Below the date range filter, there is a list of log types: 'Approval Log', 'Admin Log', and 'User Log' (labeled 2). The interface also includes a navigation bar with 'Directory', 'My Profile', 'Admin', and 'Help' tabs, and a header with the church's name and a 'Welcome Admin' message.

## Box 1: Date Range

By typing in a date range you can narrow down the list of results, or leave it blank for the entire history of the Online Directory & Mobile App.

## Box 2: List Choice

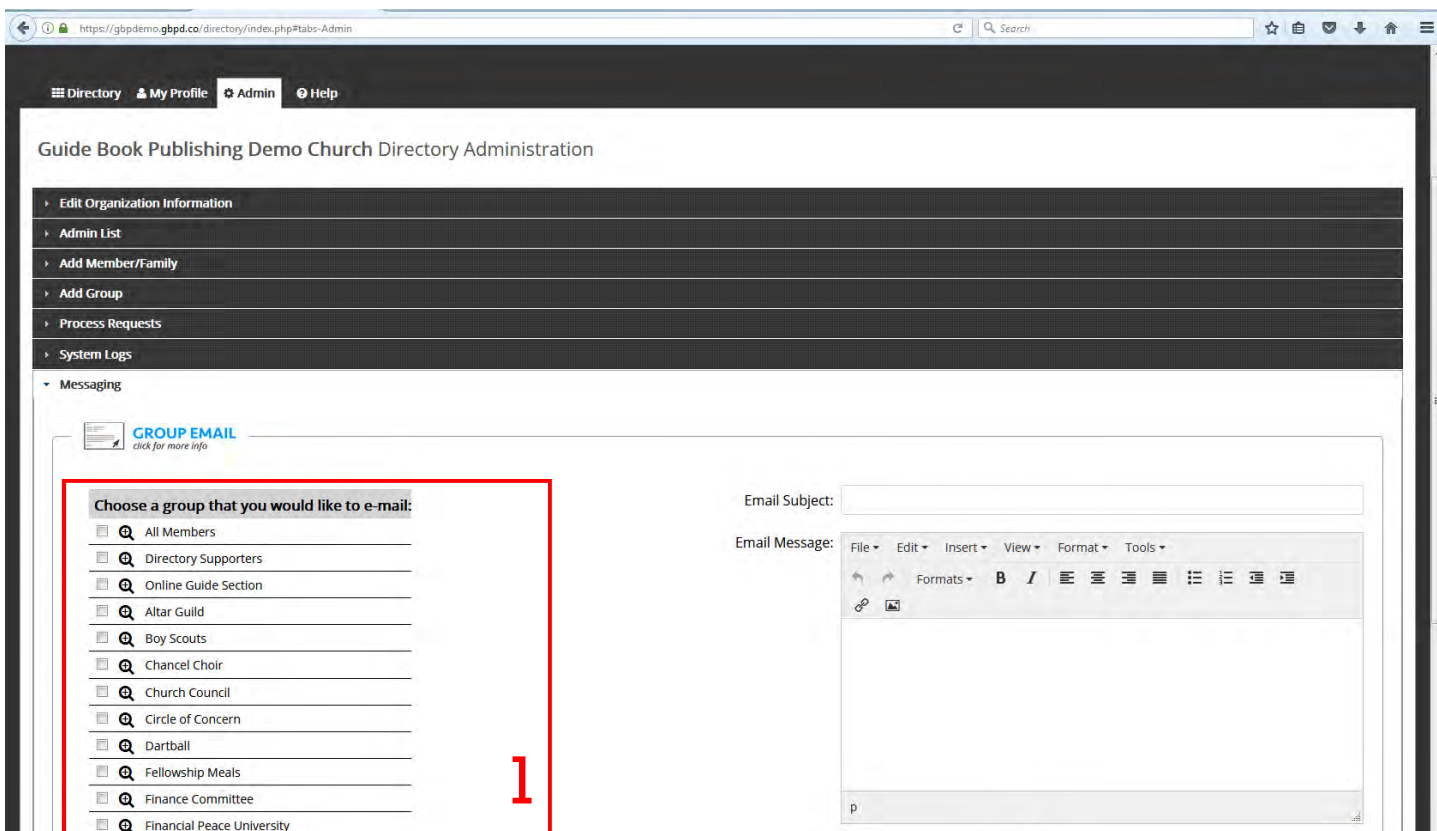
Each list shows you a different set of changes that have been made for any given date range.

**Approval Log:** Only used by directories that must verify changes by users before they go live.

**Admin Log:** Shows all changes GBP or Directory Administrators have made within the Online Directory & Mobile App.

**User Log:** Shows changes that members have made directly to their information.

# Messaging



## Messaging - Group Email

1. Locate the menu that says Group Email and select the box for the Group you would like to email

Note: Your email will be sent to members of the selected group who have an email address listed in the Online Directory and who have given permission to receive emails. Select the Magnifying Glass to see who will receive your email. (A green check mark indicates the member will receive your email. A red X indicates they will not receive your email.

### Users for: Praise Choir



First Name	Last Name	Receive Emails
Lawson	Simpson	✗
Kim	Straw	✓
Nona	Wagoner	✓



2. Compose your message. Enter your Email Subject, type the body of the Message, and select Preview Email.

Email Subject: No choir practice!

Email Message:

File • Edit • Insert • View • Format • Tools •

Formats • B / E

Choir practice has been canceled tonight due to the bad weather.

p + strong

Preview Email

3. Preview your message, and select *Send*.

Email Preview

Groups: Praise Choir,

Subject: No Choir practice!

Message: Choir practice has been canceled tonight due to the bad weather

Cancel Send Email

4. Messaging results will tell you if your message was successfully sent or if it failed to send. You will receive a copy of the email, sent to the email address in the profile you are signed in with to the Online Directory & Mobile App.

Messaging Results

Email successfully sent to:	Email failed to send to:
Praise Choir	

**Group Messages** are sent through your directory, not through your personal email program. When a Group Message is sent, the sender's name is taken from the profile the member is signed in with to the Online Directory & Mobile App. In the example of an email sent as *Sally Smith of First UMC*, Sally Smith is taken from Sally's Member Profile, and First UMC is the name of her Online Directory. When Group Members reply to her email, their reply will be sent to the Primary Email address listed in Sally Smith's Member Profile. Sally will also receive a copy of the email.

**Email one member** works differently than Email Group. To email one member, open a Member Profile and touch or click the email address in blue. Your default email program will open a new message, with the recipient's email address auto-filled in the "To" field. The message will be sent from your personal email account.

# Messaging - Mobile Notifications

Guide Book Publishing Demo Church Directory Administration

Directory My Profile Admin Help

Edit Organization Information

Admin List

Add Member/Family

Add Group

Process Requests

System Logs

Messaging

MOBILE NOTIFICATION  
click for more info

Choose a group that you would like to message:

- ☐ All Members
- ☐ Directory Supporters
- ☐ Online Guide Section
- ☐ Altar Guild
- ☐ Boy Scouts
- ☐ Chancel Choir
- ☐ Church Council
- ☐ Circle of Concern
- ☐ Dartball
- ☐ Fellowship Meals
- ☐ Finance Committee
- ☐ Financial Peace University

Notification Title:

Notification:

Preview Notification

**What are Mobile Notifications?** They are messages, sent by your church or organization, that appear on members' mobile devices. Members choose whether to allow notifications.

**Who can send Mobile Notifications?** Default settings allow only Directory Administrators to send notifications.

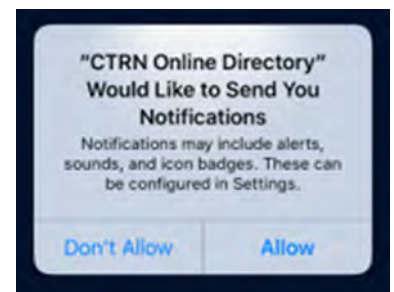
**Who receives Mobile Notifications?** Notifications are available on all smartphones and tablets that use the Guide Book Publishing mobile app. Members can choose to receive notifications on all, some or none of their mobile devices.

## Members will receive Notifications if

They have the most updated version of the mobile app downloaded on their device.

They have selected Allow when given the option to receive Notifications

They have logged in with a username and password and did NOT check the box on the sign in page that says, "I do not wish to receive notifications on this device."

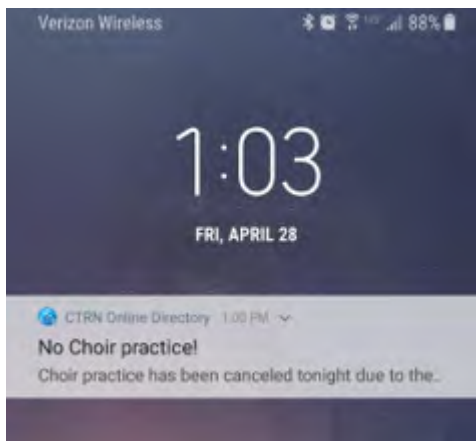


**What if a member changes their mind, and wants to opt in or out of receiving notifications?** To reset notification preferences, complete both steps below:

Open their device's Notification Settings menu and update the settings for the GBP Online Directory App. AND

Change their notification preferences on the directory's sign in page. To do this, select *Log Out* from the mobile app menu (in the upper left corner) and swipe the app closed. When they reopen the app, the sign in page will show the option to opt out of receiving notifications. Leave the box un-checked to allow notifications.

**What will members see when a notification is sent?** They will first see the notification on their device's lock screen. If they select the notification, their mobile app will open and the notification will appear within the Online Directory. They don't need to worry about missing a notification by accidentally swiping it away. If they receive multiple notifications, they will appear in the app one after another when each notification is closed.



**Can I send a notification to just one person?** Notifications are for groups, not for individuals. You can contact individuals by text message. When viewing a Member Profile on your smartphone, phone numbers in the cell phone field show the option to call or text.

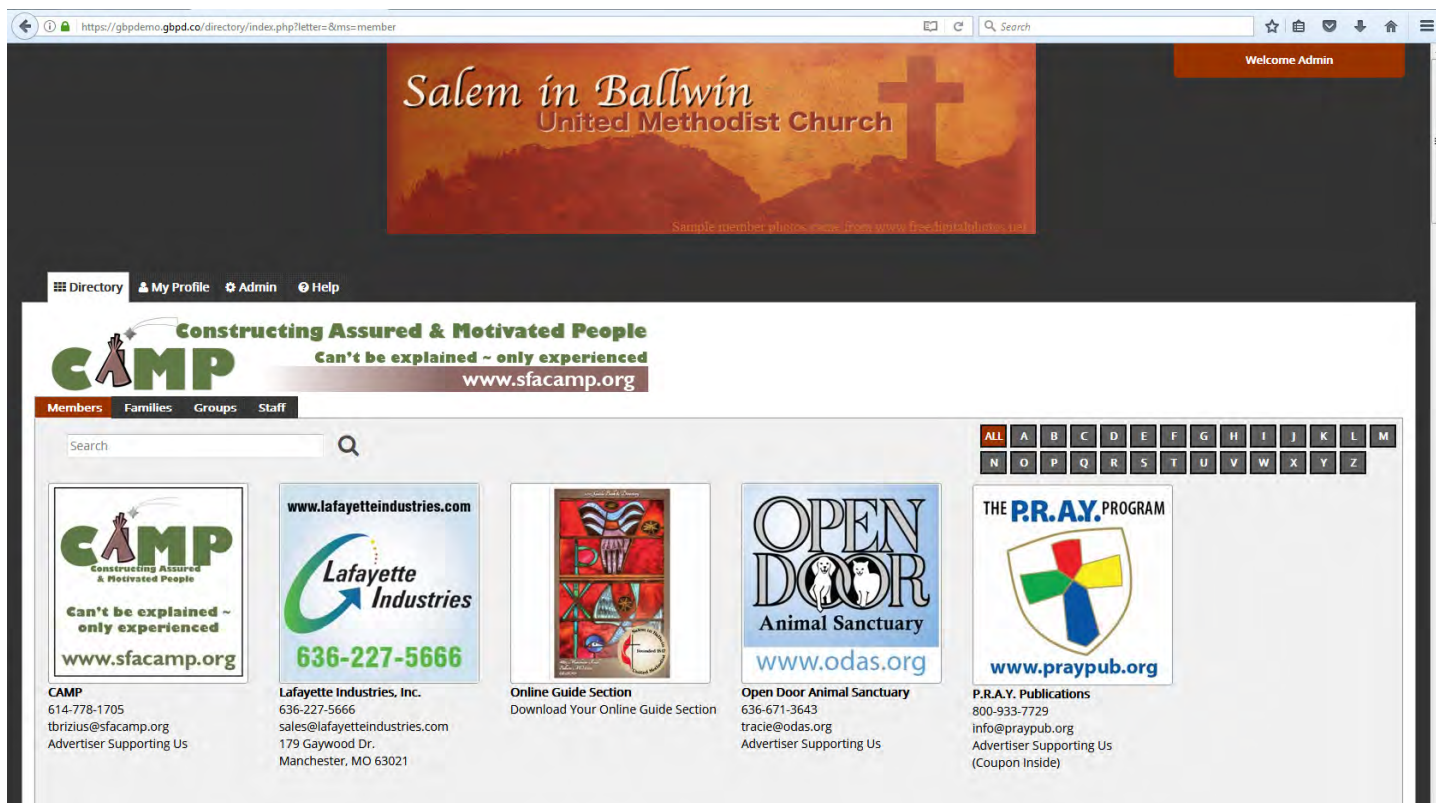
**Can I reply to a notification?** No

**What are the character limitations when composing a notification?**

Title: 55 Characters      Message: 240 characters

**How do I create a Mobile Notification?** Follow the same steps as a Group Message, except type your information into the Group Notification section of Messaging.

# Tutorials: Members Tab



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Updating Member Profile Pages	29
Adding Member Profile Pages	29
Adding to the Staff Tab	29
Uploading/Changing Profile Photo	29
Reset Password	29
Delete Member Profile	29
Assigning Usernames and Passwords	30

## Search Feature

To find a member quickly, either type their name into the Search Bar on the left, or click on the letter of their last name to the right of the screen.

## Updating Member Profile Pages

When a member asks you to make an update to their information, please note that you must make the update on both the Family Profile Page and the Member Profile Page for each family member as needed. Type in the new information and click *Update* to save.

## Adding Member Profile Pages

To add a Member Profile Page to an existing Family Profile Page, see page 32.

To add a Member Profile Page for a new family, see page 19.

## Adding to Staff Tab

To add a Member Profile Page to the Staff Tab, open the staff member's Member Profile Page, select *Add to Staff* above the First Name field, fill in their Title, and click *Update*.

## Uploading/Changing Profile Photo

To edit or change a Profile Photo, click the *Change Photo* button and follow the prompts to select and crop the photo. See page 11 for more details.

## Reset Password

When a member asks you to reset their password, click on the Password box, type in a new password (less than 13 characters), and click *Update*. If the text in the box disappears, then it worked correctly. Give the new password to the member.

## Delete Member Profile

To delete a Member Profile Page from the entire Online Directory & Mobile App, click the *Delete* button. See page 13 for more details.

# Assigning Usernames and Passwords

When your Online Directory & Mobile App first launch, GBP can mass assign this information for your members and send out an email with their access information at the same time. This email will only go to Member Profile Pages without an existing username, that have an email address listed.

Directory Administrators can provide members with a new username and password at any time. To reassign a member's username and/or password:

1. Go to the Member Profile Page
2. Type the new username and/or password in the designated field
3. Click *Update* to save changes
4. Contact the member with the updated username and/or password information

The Username field must be unique and not previously assigned to another member.

The Password field is blind to protect user privacy. Once a password is assigned and the Profile is updated, the password field will be blank.

Bob Adams

[Add to Staff](#)

First Name: Bob  
Middle Name:  
Last Name: Adams  
User Name: demo  
Password: salem  
Primary Phone: 636-394-6909  
Cell Phone:  
Primary Email: readams1@gmail.com  
Email:  
Birthday: 11/22  
Address: 16014 Forest Valley Dr.  
Address2:  
City: Ballwin  
State: Missouri  
Zip: 63021  
Visible: ☒ Visible ☐ Not Visible

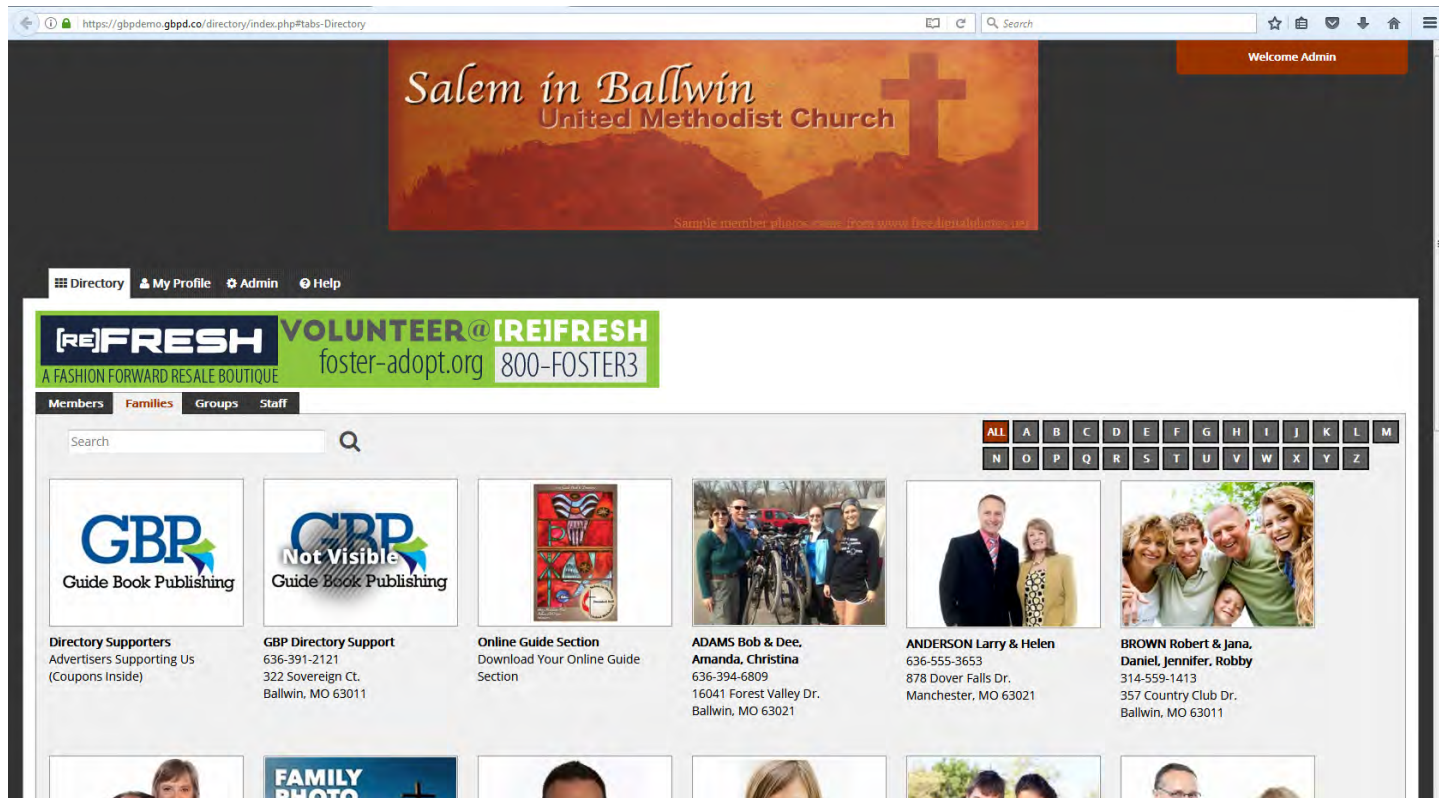
Additional Information: [Add New Information](#)

Label (e.g., "Mother")	Detail (e.g., "Mother")
Work	Guide Book Publishing
Hobby	Photography

[Update](#) [Cancel](#) [Delete](#)



# Tutorials: Families Tab



## Topics:

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Search Feature	32
Updating Family Profile Pages	32
Family Editor Feature	33
Display Order Feature	33

# Adding Members to Existing Families

To add a member to an existing Family Profile Page go to the family's Family Profile Page.

If they are an existing Member Profile Page that needs to be connected to the Family Profile Page:

1. Click *Add Member to Family*
2. Type their name into the Member Search field
3. Select the name from the dropdown, and click *Save*.

If they do not have a Member Profile Page:

1. Click *Add Member to Family*
2. Click *Create New Member* and fill out the information fields
3. Select *Save* and add a Profile Photo if needed

Family Name: WALKER Jim & Susan

Address: 123 Main Street  
Address2:  
City: Chesterfield  
State: Missouri  
Zip: 63011  
Phone:  
Visible: ☒ Visible ☐ Not Visible

Additional Information: [Add New Information](#)

Label (e.g. Mother) Detail (e.g. Mother) Order

Update Cancel Delete

Family Members

[Add Member to Family](#) [Email Family](#)

**MEMBER PHOTO COMING SOON**

Name: Jim Walker  
Editor: Yes  
Order: 99999

Add to Family: **WALKER Jim & Susan**

First Name: Jim  
Middle Name:  
Last Name: Walker  
User Name:  
Password:  
Primary Phone: 636-867-5309  
Cell Phone:  
Primary Email: jimwalker@aol.com  
Birthday:  
Address: 123 Main Street  
Address2:  
City: Chesterfield  
State: Missouri  
Zip: 63011

Cancel Save

## Search Feature

To find a family quickly, either type their name into the Search Bar on the left, or click on the letter of their last name to the right of the screen.

## Updating Family Profile Pages

When a member asks you to make an update to their information, please note that you must make the update on both the Family Profile Page and the Member Profile Page for each family member as needed. Type in the new information and click *Update* to save.



# Family Editor Feature

A Family Editor set to "Yes", allows that member to edit other family members' Member Profile Pages and reset their usernames and passwords as needed.

To view/adjust this setting for each member of the Family Profile Page:

1. Go to the Family Profile Page
2. Scroll to the bottom where each Member Profile Page is listed
3. Make sure the Editor dropdown is set to "Yes" or "No" as needed
4. Click *Save*

The screenshot displays the Family Editor interface. At the top, there are input fields for City (Ballwin), State (Missouri), Zip (63021), and Phone (636-394-6909). Below these is an 'Additional Information' section with a link to 'Add New Information'. A table lists family members with columns for Label, Detail, and Order. Below the table are 'Update', 'Cancel', and 'Delete' buttons. The 'Family Members' section shows four member profiles: Bob Adams, Dee Adams, Amanda Adams, and Christina Adams. Each profile includes a photo, name, editor status, order number, and contact information. An 'Email Family' button is located above the profiles. An 'Update' button is at the bottom left.

Label (e.g., "Hobbies")	Detail (e.g., "Knitting")	Order (e.g., "1")

Family Members

Email Family

Name	Editor	Order	Email	Phone	Cell
Bob Adams	No	1	readams1@gmail.com	636-394-6909	
Dee Adams	Yes	2	deeadams@yahoo.com	636-394-6909	
Amanda Adams	Yes	3	venturingpresident@yahoo.com	636-394-6909	314-650-3602
Christina Adams	Yes	4	adamschristina1@yahoo.com	636-394-6909	314-540-9514

Update

# Display Order Feature

Member Profile Pages will default to Alphabetical within each Family Profile Page. To set the order for which the Member Profile Pages appear within a Family Profile Page differently:

1. Go to the Family Profile Page
2. Scroll to the bottom where each Member Profile Page is listed
3. Adjust the Order box numbers (1 for first, 2 for second, etc)
4. Click *Save*

# Tutorials: Groups Tab



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Removing Members from Group	36
Adding Position Titles	36
Removing Position Titles	36
Deleting a Group	36
Group Messaging (from Groups tab)	37

## Group Photo

To Upload/Change Group Photo:

1. Go to the Group page
2. Select *Change Photo* under the photo
3. You have three options:

**Edit Photo** allows you to crop and rotate the existing photo. To crop, position your cursor on the photo, then click and drag the cropping tool. When complete, click *Update*.

**Upload New Photo** allows you to choose, crop, and save a photo.

**Remove Photo** will delete your photo and replace it with the default "No Photo" image.

## Group Description

To Add/Change the Group Description:

1. Go to the Group page
2. Click on the text box to the right of the photo
3. Edit the message displayed as needed, then select Update

Note: Any URLs put into the Group Description box will work as hyperlinks

## Adding Members to Group

To add a member to a Group, they must first be a member of the Online Directory & Mobile App. If they are not, a Directory Administrator must add them to the Directory first.

1. Go to the Group page
2. Select *Add Member to Group* under the photo
3. You have two options for Member Type:

**Group Admin** gives the member the Group Administrator rights, allowing them to make the same changes as you can in this Group.

**Group Member** simply adds their profile page to the listing of members in the Group and allows them Group Member rights.

4. In the Member Search box, type in the name of the person you want to add to the Group, select that Member from the dropdown list, then select *Save*.

## Removing Members from Group

To remove a member from a Group, but not the Online Directory & Mobile App as a whole:

1. Go to the Group page
2. Scroll down to the list of Member Profiles at the bottom of the screen
3. Under the member you want to remove, select the Remove checkbox
4. Select *Update*

## Adding Position Titles

To add a position title to a Group Member, first make sure they are a member of the Group. Then:

1. Go to the Group page
2. Scroll down to the list of Member Profiles at the bottom of the screen
3. Type their position title in the Title box under their name, select *Update*

## Removing Position Titles

To remove a position title from a Group Member:

1. Go to the Group page
2. Scroll down to the list of Member Profiles at the bottom of the screen
3. Under the member delete the text in the Title box, select *Update*

## Delete Group

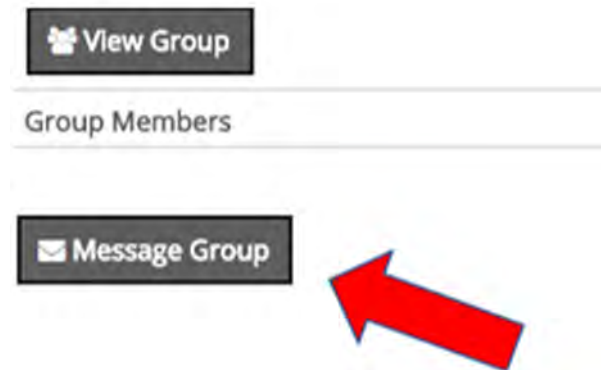
To remove a Group Profile Page:

1. Go to the Group Profile Page
2. Click *Delete*

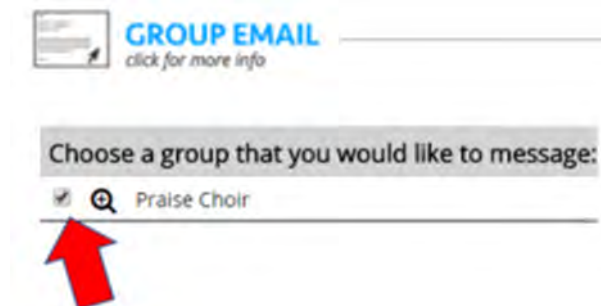
# Message Group (from Groups tab)

This feature is turned on and off by the Directory Administrator. If the button does not appear on your Group, then this feature has been turned off for Group Administrators.

1. Open the Group and select *Message Group*



2. Locate the menu that says Group Email and select the box for the Group you would like to email



3. Your email will be sent to members of the selected group who have an email address listed in the Online Directory and who have given permission to receive emails. Select the Magnifying Glass to see who will receive your email. (A green check mark indicates the member will receive your email. A red X indicates they will not receive your email.)

The screenshot shows a table titled 'Users for: Praise Choir'. The table has three columns: 'First Name', 'Last Name', and 'Receive Emails'. A large red arrow points to the 'Receive Emails' column.

First Name	Last Name	Receive Emails
Lawson	Simpson	✗
Kim	Straw	✓
Nona	Wagoner	✓

4. Compose your message. Enter your Email Subject, type the body of the Message, and select Preview Email.

Email Subject: No choir practice!

Email Message:

File • Edit • Insert • View • Format • Tools •

Formats • B / E E E E

Choir practice has been canceled tonight due to the bad weather.

p + strong

Preview Email

5. Preview your message, and select *Send*.

Email Preview

Groups: Praise Choir,

Subject: No Choir practice!

Message: Choir practice has been canceled tonight due to the bad weather

Cancel Send Email

6. Messaging results will tell you if your message was successfully sent or if it failed to send. You will receive a copy of the email, sent to the email address in the profile you are signed in with to the Online Directory & Mobile App.

Messaging Results

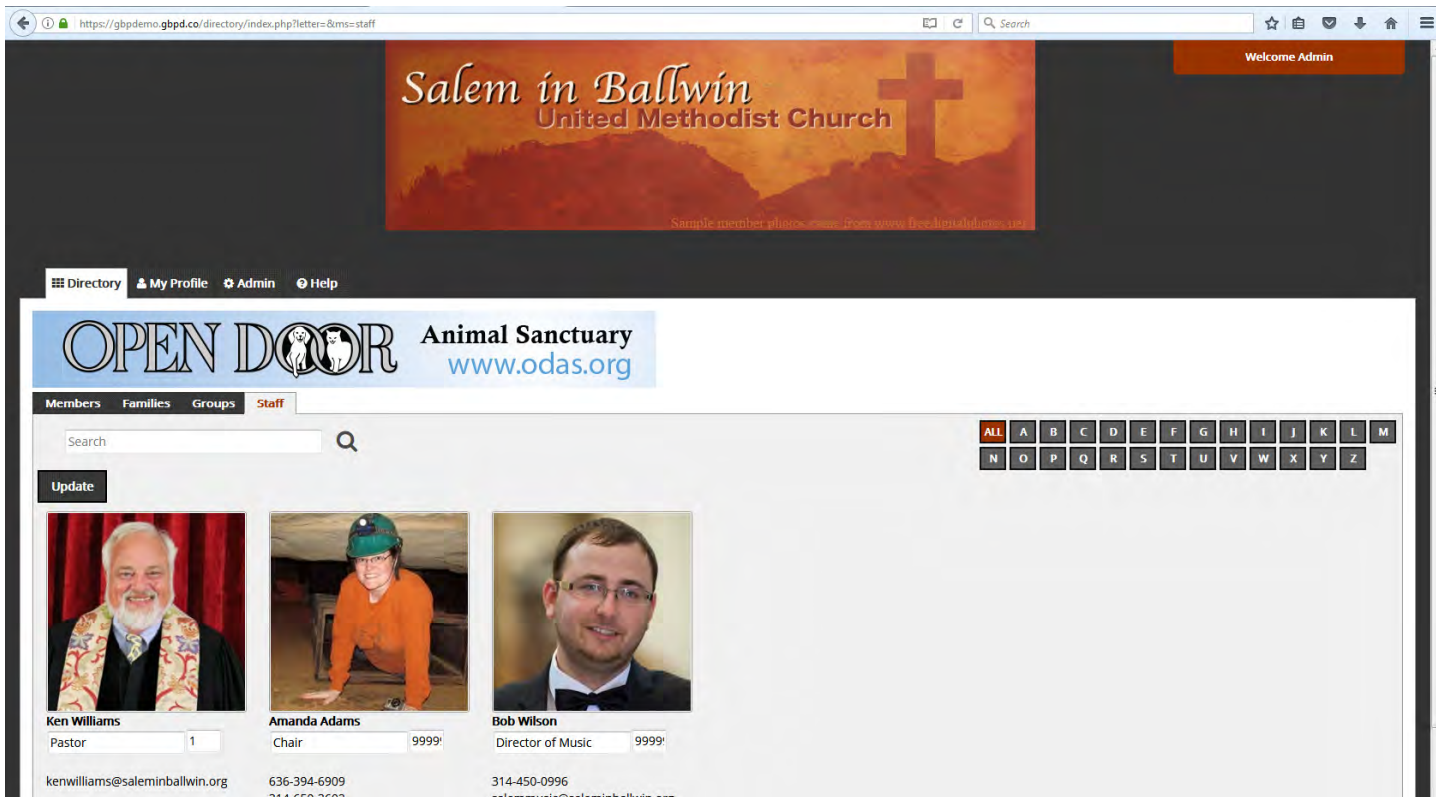
Email successfully sent to:	Email failed to send to:
Praise Choir	

**Group Messages** are sent through your directory, not through your personal email program. When a Group Message is sent, the sender's name is taken from the profile with which the member is signed in with to the Online Directory & Mobile App. In the example of an email sent as *Sally Smith of First UMC*, Sally Smith is taken from Sally's Member Profile, and First UMC is the name of her Online Directory. When Group Members reply to her email, their reply will be sent to the Primary Email address listed in Sally Smith's Member Profile. Sally will also receive a copy of the email.

**Email one member** works differently than Email Group. To email one member, open a Member Profile and touch or click the email address in blue. Your default email program will open a new message, with the recipient's email address auto-filled in the "To" field. The message will be sent from your personal email account.



# Tutorials: Staff Tab



## Add a Member Profile Page

To add a Member Profile Page to the Staff Tab, follow the steps listed on page 29

## Edit Position Title

Go to the Staff Tab, edit Title box, click *Update*.

## Remove Profile from Staff tab

To remove a Member Profile Page from the Staff Tab:

1. Check the Remove box under the Member Profile listing on the Staff Tab
2. Click *Update*

# Launch Tools



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## Bulletin/Newsletter Articles

To view the bulletin articles, you will need to use your Congregation Login Password for GBP's website. That information is available in the printed Guide Book & Directory Handbook.

Links for Bulletin Articles:

[Development Article](#)

[Privacy Reminder and Photo Submission Article](#)

[Last Member Opt Out Chance](#)

[Groups List Article](#)

[Photo Day Article](#)

[Launch Article](#)

## Team Agendas

If you choose to utilize a team of people to help you manage the Online Directory & Mobile App, here are some tools to help you:

[Team Suggestions](#)

[First Meeting Agenda](#)

[Second Meeting Agenda](#)

## Groups Overview and Tools

Groups are designed to allow ministries and organizations within your congregation to communicate easier. They allow a Group photo, description box, and have a Group Message feature allowing easy emails and mobile notifications. One easy way to decide which groups to make is to look at your Guide Section for your printed Guide Book & Directory.

Here are some tools to make gathering details for the Groups tab easier:

[Groups List Form](#): Designed to give to Group Leaders for them to fill out with information and members they would like added to their Group Profile Page.

[Group List Consolidation Template](#): This is something for your use if it will make it easier to consolidate information on which members you need to add to each group.

## Photo Overview and Tools

Photos can be added by either a Directory Administrator, or by the member themselves. The great thing about the Online Directory & Mobile App is the pictures can be more casual, and there are no formal photo sessions where members feel pressured into buying photo packages.

That being said, it may be nice to offer to take photos for your members that do not have a smartphone, or a recent photo on their computer that they can easily upload.

If you choose to have a member take photos of other members for you, try the [Photo Order Sheet](#). This allows the photographer to write down the names in the order they take the photos.

## Member Instructional Email Text

On the day your extra copies of the printed Guide Book & Directory arrive in your congregation's office, GBP will check to make sure your Online Directory is linked to your website. Around that day, **GBP will send out the below email to all members with an email address in the Online Directory & Mobile App**. Please fill in the items in red. You are welcome to change the black content of this email as needed. This ensures your members have access to the Online Directory & Mobile App by the time the printed Guide Book & Directory arrives in their mailbox. There are bulletin articles available online to tell your members that they will receive this email from [amandavogt@guidebookpublishing.com](mailto:amandavogt@guidebookpublishing.com).

[Member Instructional Email Text](#)

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